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ABSTRACT

In this report, transformative learning processes in 10 successful extension staff partnerships involving a campus researcher and a county extension staff member were studied with a methodology that combines grounded theory and case study traditions with a constructivist approach. Data collection activities included a literature review; semi-structured interviews with the partnership members; document reviews; observations of the partners at work; and feedback about the partnerships from the partners, their peers, and other extension staff. The following types of learning were identified as key to the partnerships' success: (1) instrumental (learning focusing on improving performance through task-oriented problem solving); (2) communicative (learning that emphasizes learning for understanding); and (3) transformative (learning resulting in a major change in thinking or perspective where individuals become responsible for their actions, more autonomous, and use clearer thinking when making decisions). The following factors were identified as being conducive to transformative learning: (1) strong partner facilitation; (2) critical reflection; (3) the presence of critical events setting the foundation for change or enhanced transformation; (4) a fundamental difference between partners that is bridged by their common purpose; and (5) a climate of "independence with interdependence" wherein partners retained their autonomy while depending on the other partner to enhance the success of the work at hand. (Contains 12 references.) (MN)

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Transformative Learning in Extension Staff Partnerships: Facilitating Personal, Joint, and Organizational Change

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ABSTRACT

Partnerships can enhance individual and organizational success through more effective problem solving and improved adaptation to change. Working in partnerships is not easy and learning is often required for successful collaboration that may transform the partners. This study explores learning in Extension staff partnerships that transform the individual, the partnership, and the organization. Three types of learning were identified including eight types of transformative learning. Conditions that promoted transformative learning in successful partnerships included strong partner facilitation, critical reflection, critical events, partner difference bridged by common purpose, and independence with interdependence. Recommendations for nurturing transforming Extension staff partnerships are shared.

INTRODUCTION

Partnerships can enhance individual and organizational success through more effective problem solving and improved adaptation to change. Working in partnership is difficult and often requires learning for successful collaboration. This learning sometimes transforms or changes the partners in a collaboration. This change may stem from transformative learning—a type of learning resulting in a different frame of reference rather than technical, skill based, or practical learning (Kreber & Cranton, 2000). Therefore, it is important to understand how successful Extension staff partnerships use learning in ways that transform the individual, the partnership, and organizations.

Researchers and practitioners increasingly express interest in understanding the role of partnerships in adapting to or embracing change (Bennis & Biederman, 1997). It has been shown that people working together often deal with change more successfully than when they work alone. By taking on tasks and learning together, individuals gain more integrated and balanced views of themselves and their work (Anderson, 1992).

What is the role of transformative learning in successful Extension staff partnerships between campus academics and county practitioners? The answers to this question are important because Extension leaders need to know how partnerships can facilitate adaptation to internal and external forces. This includes how to align individual transformation with larger organizational change. Without this information, change is slow, thwarted or never fully realized. This study explored change in individuals by observing and analyzing successful partnerships between Cornell Cooperative Extension

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(CCE) campus faculty and county Extension educators to determine the role of transformative learning in these cross-profession partnerships.

REVIEW OF THE LITERATURE

Although a great deal of literature focuses on successful partnerships, few researchers have studied cross-profession partnerships, intraorganization partnerships, or learning in partnerships. Cross-profession partnerships made up of researchers and practitioners strengthens research (Amabile, Patterson, Mueller & Wojcik, 2001) but requires the breaking down of ideological and political boundaries between professions (Tourse & Mooney, 1999). Rosabeth Moss Kanter (1994) claims that successful partnerships are learning oriented and result in partners who are open to new ideas and see across boundaries (Hesselbein et al., 1996).

One field of research in education focuses on transformative learning theory. Jack Mezirow (1991) the founding father of this theory suggests individual transformation includes a change in a frame of reference or way of seeing the world. Mezirow and others in the field less often explore this theory in groups or organizations and rarely look at its presence in a partnership context. For transformative learning to take place in educational settings, the educator needs to provide a safe environment for the learner to nurture critical reflection (Mezirow, 2000). With these thoughts in mind, this article explores the role of transformative learning in successful Extension partnerships between campus researchers and county practitioners.

METHODOLOGY

A combination of grounded theory and case study traditions with a constructivist approach informed this research. The study included ten successful Extension staff partnerships made up of one campus researcher and one county educator. Campus and county Extension administrators and peers nominated successful partnerships for the study. An advisory committee of campus and county Extension staff selected the final slate of partnerships for the research. This advisory committee also helped shape the study and provided feedback on the research findings.

Each partner in the study participated in a semi-structured interview about their history with Extension, the work of their partnership, and learning and success in their partnership. The interviews were transcribed and coded for common themes. Partner profiles created from the interviews described success and learning in the partnership. Each partner interacted multiple times with the researcher to edit and prepare their profiles for public use and to react to the findings from the study.

Additional data on successful CCE campus-county staff partnerships was collected through document review, observations of partners at work, feedback about the partnerships from the partners and their peers, and feedback on the findings from the partners and other Extension staff. These data were analyzed using Eisenhardt's (1989) comparative case study method that revealed variation and commonalties of success and learning within and across cases.

RESULTS

Successful Partnerships

All ten partnerships studied had reputations for being successful. Several common factors contributing to that success surfaced across cases. The first included a commitment by the partners to a bigger picture or fit with the environment outside the partnership. Strong communication, promoting partnership outcomes, stakeholder involvement, and integrating the partnership work into the overall organization illustrated this commitment. Second, specific drivers of learning identified by the partners made their work successful. These included mutual respect among partners, stretching, challenging, or pushing each other's thinking and capacities, trust, a supportive environment, and successful outcomes that supported learning in the partnership. Third, partners indicated challenges in partnership work existed but they found that education of themselves and others as well as persistence helped overcome these barriers. Challenges did not prevent these partnerships from working towards their goals. Finally, personal attributes of the partners promoted success in the partnership. Partners often had similar motivations for entering into and staying in a partnership. One commonly valued attribute of partners included providing personal support that resulted in raised or affirmed self-esteem. Partners indicated this support was a key to the success of personal and partnership success.

Learning and Transformation in Partnerships

Three types of learning surfaced in successful campus-county Extension staff partnerships—instrumental, communicative, and transformative learning (Mezirow, 1991). Instrumental learning focuses on improving performance through task-oriented problem solving and leads to learning how to control people and the environment. This type of learning includes empirical testing in search of the truth. In this study, all of the partnerships experienced instrumental learning. Partners indicated learning how to improve group facilitation skills, how to navigate campus and local environments, and increasing their knowledge about the theory and practice of Extension work.

Communicative learning emphasizes learning for interpersonal understanding. A key part of this learning includes reflective discourse with others about the meanings that people communicate. In this research, communicative learning had a strong presence in all but one partnership. Partners learned how to work effectively with each other across differing work, communication, and learning styles, personalities, and worldviews. By better understanding each other's professions, they learned how to give more appropriate feedback and advice. Partners mentioned that over time they came to see the partnership from the other person's perspective.

Transformative learning results in a major change in thinking or perspective where individuals become more responsible for their actions, more autonomous, and use clearer

thinking when making decisions. In this study, transformative learning existed in six of the ten partnerships including nine of these twelve partners. The research revealed eight types of transformative learning based on the partner's awareness of their transformation, whether or not the transformed partners took personal action based on their change, and to what degree the partners attempted to initiate change in others related to their own transformation. Partners who were transformed from their partnership experience indicated gaining a more holistic view of their work, the ability to better understand processes around them, personal development, and the alleviation of professional isolation. Transformed partnerships experienced a deepened commitment to their goals, enhanced action, enhanced learning, and increased use of shared leadership styles. These partnerships indicated that the organization transformed because they provided models for others in the organization to emulate, their success created additional success, and organizational learning was heightened.

Conditions for Transformative Learning in Partnerships

Transformative learning is considered important for more integrated and inclusive thinking and decision making in individuals. This study found five common conditions that promotes this type of learning in Extension staff campus-county partnerships. The first included strong partner facilitation. Partners in partnerships where transformative learning took place were strong facilitators of reflective discourse. They also used a variety of methods to facilitate learning. The second condition, critical reflection in transforming partnerships included the practice of thinking critically about individual, work, or process assumptions. Partners articulated the original assumptions they used in their work and the new assumptions they constructed from the change process that occurred. The new assumptions they arrived at through critical reflection often resulted in broader views of their work.

The third condition for transformative learning in partnerships included the presence of critical events that set the foundation for change or enhanced transformation. The events sometimes served as disorienting dilemmas resulting in partner reflection about the associated discomfort. The fourth condition focused on a fundamental difference between partners bridged by a common purpose. In transforming partnerships, partners differed in personality, work styles and/or worldviews. Finally, transformative learning was enhanced by a condition some partners called "independence with interdependence." This included the process of retaining personal autonomy yet depending on the other partner to enhance the success of the work at hand. Through this process, campus and county Extension staff sought out each other to alleviate professional isolation and to better meet the needs of local residents. Partners indicated that the partnership mission and their leadership roles in statewide Extension program work teams guided interdependence.

CONCLUSIONS

Several main themes arise from this study. The first includes the significance of a fundamental difference between partners that promotes transformative learning. This suggests that diversity management encompasses more than creating a physically diverse workforce. Diversity efforts must bring together people with diverse perspectives to enhance each other's learning under a common purpose that bridges this difference.

According to the results of this study, transformed individuals can contribute to more quickly adapting to environmental change. Personal change may happen without organizational change and vice versa but joint transformation can result in individuals and organizations more quickly adapting to environmental change. A fragmented approach to change may impede or slow the transformation process. Individual and organizational change strategically aligned can produce a hastened response to change.

Leadership in partnerships greatly impacts the transformative learning process. Joint leadership that facilitates reflective discourse around personal and shared assumptions promotes transformative learning. A deep developmental view of facilitation rather than a simple process approach results in deep change in one or both partners.

Transformative learning has many faces. Frequently people don't realize or acknowledge how they have changed through their work together. Some of them, in this unknowing stance affect change in others. Other people who are aware of their own transformation consciously choose to change themselves and/or work towards change in others and/or the organization. It cannot be assumed that the transformation process occurs in the same way for everyone and every partnership.

RECOMMENDATIONS FOR THE COOPERATIVE EXTENSION SYSTEM

If the Cooperative Extension System truly promotes organizational learning and serves as a catalyst for individual and community change through education, it must also change to better encourage and sustain transformative learning in its staff. This requires fostering partnerships, dealing with barriers to effective partnerships, promoting critical reflection to encourage transformative learning, helping staff gain strong facilitation skills, and promoting diversity.

State and county Extension administrators need to create and support environments that facilitate cross-profession relationship building and partnership formation. This includes opportunities for staff to meet each other, engage in discourse, to solve problems together, and share their work with others. One specific approach includes an accessible database of staff interests so people with similar interests can quickly locate each other. A statewide Extension e-newsletter could also support the location of potential partners and the sharing of partnership work and processes. Models of successful staff partnerships need to be identified and lauded across the organization. This could be enhanced by creating an innovative grant program or orchestrating organizational events that foster, explore, and recognize campus-county staff partnerships. Administrators should also attempt to align organizational transformation that parallels and/or enhances transformative learning in partnerships. Finally, leaders need to communicate the value of cross-profession partnerships in legitimizing county staff as full partners with campus

faculty in Extension research and programming. These strategies would promote partnership formation and sustainability but not force staff interaction.

To help partnerships flourish, barriers preventing partnership success need to be dealt with. Specifically barriers related to university departments and county Extension units such as the reward system for staff should be reviewed. Incentives should recognize partnership work that creates change rather than furthering the status quo. Administrators and staff supervisors on campus and in counties must also articulate the local and system-wide value of partnerships. In addition, professional associations can provide resources, support, and recognition to help partnerships overcome institutional barriers, and support innovations that go beyond the usual institutional expectations. Organizational systems need to be "partnership friendly." This includes creating more convenient mechanisms for transferring resources between Extension partners and their units. Staff may also find it difficult to form partnerships with each other due to multiple program responsibilities and generic titles that do not accurately reflect their work. Administrators should therefore combat this fragmentation of staff duties and implement consistent, descriptive job titles.

Extension must find a way to promote critical reflection as a medium for promoting transformative learning in staff. In the active world of Extension work, this remains a challenge. Administrators, supervisors, and influential staff must model deep reflection about their assumptions on an ongoing basis through their work. This comes from generating thought provoking questions, raising and testing propositions, showing curiosity, and being conscious about the ethics of their work (Brookfield, 2000). Professional development opportunities, staff meetings, committee meetings, work teams, and other staff gatherings should consistently include critical thinking and reflection activities such as action learning, scenario building, and the use of metaphors (Deshler & Keily, 1995). Technology should also be used to help staff record their reflections and to promote critical dialogue with others throughout the organization.

Supporting transformative learning in Extension staff requires that they become competent facilitators of learning for each other. The presence of a strong facilitator often helps Extension staff survive the stress of transformation. Therefore, staff should be hired who exhibit successful educational facilitation skills or have the potential to do so. Regional and campus based workshops should also focus on developing facilitation for learning in staff. To ensure that facilitators do in fact support a transformative learning environment, training, practice, and support for leading reflective discourse is critical. A mentoring system could also match experienced facilitators with those new to the process to learn facilitation skills that help guide others on their learning path such as creating a learning environment, asking probing questions, making connections, and synthesizing information. Developmental facilitators must also be learner more than content centered, create transforming learning environments, use a variety of facilitation methods, be flexible, and able to critically reflect on their own learning. A professional development certificate program based on acquiring these skills could enhance strong facilitation of learning in Extension staff.

Finally, diversity should be promoted more broadly within Cooperative Extension. Traditionally diversity efforts have honored physical differences in employees. To encourage transformative learning in staff, diversity management should expand to consciously ensure that staff work together with others who have differing personalities, work styles and worldviews. The organization also needs to create, support, and recognize safe environments that promote change and value diversity to help transforming partnerships flourish. This includes fostering dialogue that defines diversity, listening for and recognizing wisdom in each other, connecting with individuals as a whole person not just their interests and skills, and seeing difference as critical to reaching a common purpose and addressing complex problems.

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